

Request for Proposals: Scope of Services

Master Plan Update
Town of Grafton Massachusetts

January 12, 2022

A. Introduction

The current Grafton Comprehensive Master Plan was last updated in November 2001 with a published effective date of December 1, 2001. Twenty years have now passed since the document has been updated, warranting review and revision to ensure the plan reflects the current community context and vision as well as utilizes current data to inform the Town's decision-making processes. With the recent release of the 2020 Decennial Census data, there is significant opportunity to utilize this new resource to review the Town's progress and formulate a vision for the next ten years.

The Town of Grafton has chosen a three phased approach to updating the Master Plan in order to reduce the annual fiscal requirements of the project, spreading the update over a three-year period. The Town also anticipates this strategy to enhance the availability of local staff capacity to engage in the project as well as allow more effective public participation to be generated. The Town anticipates completion of the project in late 2023 or early 2024.

Phase I: Data Collection

A number of existing subplans have had recent updates and reflect more recent data collection and community outreach efforts. The data within these plans may provide a beneficial starting point for related sections to be included in the Comprehensive Master Plan, however the data included in these plans should also be updated to reflect most recent available figures. Staff and the Planning Board will review if the updated data warrants amendments to the associated analysis of these subplans. If such amendments are found to be required, they may be included in subsequent phases of the Comprehensive Master Plan Update.

Phase II: Public Engagement

The data collected in Phase I of the Master Plan update will inform the public and stakeholder engagement of the project. Phase II shall consist of a number of individual stakeholder interviews as well as several public workshops and presentations. Staff will coordinate a list of identified stakeholders with the selected consultant, subject to review and comment by the Planning Board. A minimum of ten individual stakeholder interviews of approximately one hour each should be provided. A minimum of two public workshops consisting of thirty-minute presentations and ninety minutes of discussion should also be provided. Workshops and Interviews shall be organized to maximize collection of and public input consistent with the provisions of M.G.L. Chapter 41 Section 81D.

Phase III: Finalization

Following the Phase I Data Collection and Phase II Public Engagement, Phase III shall consist of collating the gathered information, analysis, discussion and relevant records into a final published document. The final product shall be consistent with the provisions of M.G.L. Chapter 41 Section 81D and will be made publicly accessible.

B. Project Purpose

The purpose of this project is to collect data and develop a preliminary analysis in relation to the Grafton Master Plan Update to frame and better inform public outreach, engagement and discussion in the update's subsequent phases. The project shall draw on a variety of sources and, to the extent possible, shall update the data associated with the 2001 Comprehensive Master Plan, associated subplans (as identified herein) and other charts, graphs and/or figures as identified in the initial kickoff meeting described below.

C. Project Scope

Phase I: Data Collection

The project consultant will attend a preliminary kickoff meeting with staff and the Planning Board at a regularly scheduled public meeting to solicit input on a preliminary draft of plan sections and important topics for data collection. Data collected will be organized into editable Excel worksheets or another database as deemed appropriate. Associated tables, graphs and related figures shall be generated from the collected data and reviewed by staff for accuracy and appropriate formatting.

Where appropriate and to the extent possible, data shall include a twenty-year timeframe from 2000 (the last Comprehensive Master Plan Update) with intervals of one or five years. Where appropriate and to the extent possible, future projections shall be made at one-, five-, or ten-year intervals from 2020 to fit with an anticipated 10-year plan relevance.

A comprehensive list of relevant graphs and figures from the following plans, reports and studies should be collected and updated where possible:

- 2020 Open Space and Recreation Plan
- 2020 Community Preservation Plan
- 2018 Housing Production Plan
- 2017 North Grafton Transit Village Master Plan
- 2006 South Grafton Villages Master Plan
- 2005 Grafton Intersection Master Plan
- 2001 Comprehensive Master Plan

Data Categories should include at a minimum, the following:

- Population & Demographic Trends
- Incomes/Financial
- Housing Growth
- Housing Affordability
- Traffic/Commute/Crash
- Employment/Businesses
- Health

Allocation of Staff Time

The majority of the work will be conducted by the project consultant at their own direction. The Planning Department will allocate approximately 30 hours to support the consultant in development and presentation of the Phase I materials, primarily through review and suggested edits to materials and

occasional meetings to provide input as needed. A breakdown of anticipated tasks and hours has been provided below for reference. The provided breakdown is an estimate only. Adjustment of these tasks and hours may be made in coordination with the Town Planner.

PHASE I TASKS	RESPONSIBILITY	STAFF HOURS
1. PRELIMINARY KICKOFF MEETING	Planning Board & Staff	1
2. COLLECT & ORGANIZE DATA	Staff	12
3. PRESENTATION OF INITIAL DATA	Planning Board & Staff	1
4. REVISIONS AND COMMENTS	Staff	5
5. PRELIMINARY ANALYSIS	Staff	5
6. PRESENTATION OF FINDINGS	Planning Board & Staff	1
7. FINAL DELIVERABLES	Staff	2
8. OTHER/CONTINGENT		5
TOTAL:		30

Data Sources

The following list is an initial draft of data sources for the Comprehensive Master Plan update. This list is a preliminary draft, subject to change during the development of the Comprehensive Master Plan Update and is provided for reference only to assist with formal scope development. A finalized list will be developed in coordination with the consultant during the preliminary kickoff meeting:

- Census.gov
- GIS Datalayers
- 2020 Open Space and Recreation Plan
- 2020 Community Preservation Plan
- 2018 Housing Production Plan
- 2017 North Grafton Transit Village Master Plan
- 2006 South Grafton Villages Master Plan
- 2005 Grafton Intersection Master Plan
- 2001 Comprehensive Master Plan

Required Meetings

The proposed project scope should include the meetings listed below. At a minimum, there shall be three (3) public meetings, though the consultant may elect to add more within their response to this RFP. Additional staff level meetings will be coordinated and held as needed. The consultant shall include a minimum of three (3) one hour staff level meetings, though the consultant may likewise elect to add more within their response to this RFP.

Preliminary Kickoff meeting

The Consultant will conduct a public meeting in Grafton with the Planning Board and other key project participants. The purpose of the meeting will be to review, and if necessary, refine the Project scope.

Presentation of Initial Data

The Consultant will conduct a public meeting in Grafton with the Planning Board and other key project participants. The purpose of the meeting will be to review the collected data, obtain public input, and if necessary, propose revisions, comments, and considerations for the preliminary analysis.

Presentation of Findings

The Consultant will conduct a public meeting in Grafton with the Planning Board and other key project participants. The purpose of the meeting will be to review the preliminary analysis, obtain public input, and if necessary, propose revisions, comments, and considerations for the final deliverables.

Phase I Deliverables

The selected applicant shall prepare and deliver the following in relation to Phase I:

- Relevant graphs and figures as defined in Section C. Project Scope
- Preliminary Analysis & Findings Narrative

Phase II: Public Engagement

Using data collected in Phase I, the project consultant will work with staff and the Planning Board to identify local stakeholders and engage the public to solicit additional input on the preliminary data and findings. Public engagement shall be broad and inclusive in order to reflect the diverse population of Grafton. The Phase I data and findings will form the basis of discussion with stakeholders through individual interviews as well as the general public through public workshops and surveys. The public engagement strategy shall include multiple participation models with a minimum of:

- Survey (Online and Paper format)
- Public Workshop/Charette
- Public Meetings
- Stakeholder Interviews

Topics of additional data collection, or areas to expand analysis, will likely be identified through the public engagement process and shall be coordinated by the project consultant with direction and support from staff. The project consultant will organize the Phase I and Phase II findings into a rough draft of the Master Plan. The general structure of the plan, narratives, data and analysis should be the primary focus of this phase with recommendations and implementation to be more accurately determined in the following Phase III.

Allocation of Staff Time

The majority of the work will be conducted by the project consultant at their own direction. The Planning Department will allocate approximately 30 hours to support the consultant in development and presentation of the Phase II materials and conducting public outreach, primarily through review and suggested edits to materials, coordination and advertising of meetings and workshops. A breakdown of anticipated tasks and hours has been provided below for reference. The provided breakdown is an estimate only. Adjustment of these tasks and hours may be made in coordination with the Town Planner.

PHASE II TASKS	RESPONSIBILITY	STAFF HOURS
1. PRELIMINARY KICKOFF MEETING	Planning Board & Staff	1
2. STAKEHOLDER INTERVIEWS	Staff	10
3. PUBLIC WORKSHOPS	Planning Board & Staff	5
4. PLAN DEVELOPMENT	Staff	5
5. PRESENTATION OF FINDINGS/DRAFT	Planning Board & Staff	1
6. REVISIONS & COMMENTS	Staff	1
7. FINAL DELIVERABLES	Staff	2
8. OTHER/CONTINGENT		5
TOTAL:		30

Required Meetings

The proposed project scope should include the meetings listed below. At a minimum, there shall be two (2) public meetings, ten (10) stakeholder interviews of approximately an hour each, as well as a minimum of two (2) public workshops including consultant presentations on topics and discussion, though the consultant may elect to add more within their response to this RFP. Additional staff level meetings will be coordinated and held as needed. The consultant shall include a minimum of five (5) one hour staff level meetings, though the consultant may likewise elect to add more within their response to this RFP.

Preliminary Kickoff meeting

The project consultant will attend a preliminary kickoff meeting with staff and the Planning Board at a regularly scheduled public meeting to solicit input on a proposed public engagement strategy as well as identify potential local stakeholders based upon the data collection and preliminary analysis of Phase I.

Stakeholder Interviews

The project consultant will coordinate stakeholder interviews as identified in the Phase II preliminary kickoff meeting. Discussion prompts and questions for the stakeholder interviews should be specifically tailored towards the stakeholder and relevant preliminary analysis. Although questions from the survey can also be included, the survey is intended to be more general in nature. The stakeholders should be encouraged to complete the survey on their own time.

The project consultant shall maintain notes during the meeting which will be included as an appendix of the final report, along with any additional relevant information produced. The notes as included in the appendix may be anonymized if requested by the stakeholder. Anonymization of data shall be conducted in coordination with municipal staff.

Public Workshops

The project consultant will coordinate public workshops as identified in the Phase II preliminary kickoff meeting. Specific meeting format shall be coordinated via Planning Department staff and the project consultant but should consist of both a formal presentation to frame discussion followed by public input and informal discussion. A “comment collection box” or similar method shall also be provided at public workshops for those who do not wish to comment openly.

The project consultant shall maintain notes during the meeting which will be included as an appendix of the final report, along with any additional relevant information produced.

Presentation of Findings

The Consultant will conduct a public meeting in Grafton with the Planning Board and other key project participants. The purpose of the meeting will be to review the collected public and stakeholder input, draft analysis and narratives, and if necessary, propose revisions, comments, and considerations for the final deliverables.

Phase II Deliverables

The selected applicant shall prepare and deliver the following in relation to Phase II:

- Survey (Online and Paper format)
- Public Workshop Presentation materials
- Preliminary Draft Master Plan

Phase III: Finalization

Using data collected in Phase I and Phase II, the project consultant will work with staff and the Planning Board to finalize the Master Plan update and develop final distributable materials. The majority of plan development in this phase will focus on development of a feasible implementation plan and recommendations. Some additional engagement or data collection to fill any remaining gaps, as identified by the Planning Board and Staff during the Preliminary kickoff meeting, may be required.

Allocation of Staff Time

The majority of the work will be conducted by the project consultant at their own direction. The Planning Department will allocate approximately 15 hours to support the consultant in development and presentation of the Phase III materials, primarily through review and suggested edits to materials, and coordination and advertising of meetings. A breakdown of anticipated tasks and hours has been provided below for reference. The provided breakdown is an estimate only. Adjustment of these tasks and hours may be made in coordination with the Town Planner.

PHASE III TASKS	RESPONSIBILITY	STAFF HOURS
1. PRELIMINARY KICKOFF MEETING	Planning Board & Staff	1
2. PLAN DEVELOPMENT	Staff	5
3. PRESENTATION OF FINAL DRAFT	Planning Board & Staff	1
4. REVISIONS AND COMMENTS	Staff	2
5. FINAL DELIVERABLES	Staff	1
6. OTHER/CONTINGENT		5
TOTAL:		15

Required Meetings

Preliminary Kickoff meeting

The project consultant will attend a preliminary kickoff meeting with staff and the Planning Board at a regularly scheduled public meeting to solicit input on finalization of the Master Plan update.

Presentation of Final Draft

The Consultant will conduct a public meeting in Grafton with the Planning Board and other key project participants. The purpose of the meeting will be to review the Final Draft of the Master Plan, and if necessary, propose revisions, comments, and considerations for the final deliverables.

Phase III Deliverables

The selected applicant shall prepare and deliver the following in relation to Phase III:

- Final Master Plan (Online/digital and 5 Hardcopies)

D. Project Budget

The Town has a total budget for this project of \$100,000 divided into three phases as detailed below and subject to allocation at the Annual Town Meeting. The initial amount of \$30,000 for phase one was allocated at the June 5, 2021 Annual Town Meeting and is available. The remaining portions are anticipated to be allocated according to the provided Capital Request Schedule below.

MASTER PLAN CAPITAL REQUEST SCHEDULE

PHASE	AMOUNT	TOWN MEETING	STATUS
I	\$30,000	June 5, 2021	Available
II	\$50,000	June, 2022	Pending TM Approval
III	\$20,000	June, 2023	Pending TM Approval
TOTAL:	\$100,000		

E. Project Schedule

All services required under this Scope of Services shall be completed prior to June 1, 2024. In their proposal, the Consultant shall outline a schedule for completing each task and each phase consistent with the project budget and the Master Plan Capital Request schedule for allocation of funds as defined above. Consideration of contingencies in the event of delayed financing are desirable.

F. Proposal Submission Requirements

Proposals shall be submitted to the Grafton Planning Department as outlined below, on or before February 18, 2022. Proposals received after February 18, 2022 will not be considered unless prior formal approval for a late submission is provided by the Planning Department.

Technical Proposal

For consideration, three (3) hardcopies and one (1) digital copy of the technical proposal shall be submitted in an envelope with the Consultant's name and marked:

Grafton Master Plan Update Technical Proposal

And shall include the following:

- i. A description of the firm's qualifications, including details of current and previous projects of this type.
- ii. The resumes of professional personnel who will be working on the project. The manager or professional who will be responsible for planning, coordinating, and conducting the majority of the work must be identified and committed to this project.
- iii. A list of potential sub-consultants proposed to assist the principal consultant. This list shall include the sub-consultant's qualifications pertinent to this project.
- iv. Request for Proposal
- v. Client reference list with full contact information for clients for similar projects.
- vi. Estimated timeline for completion of project.
- vii. A narrative description of the scope of work which substantiates the firm's understanding of the project and its objectives for the principle.
- viii. A written description of the firm's approach to soliciting input from various boards, stakeholders, and the public including detailed breakdown of the number and format of meetings viewed as necessary to complete the project.

Price Proposal

For consideration, two (2) hardcopies and one (1) digital copy of the price proposal shall be submitted in a separate envelope with the Consultant's name and marked:

Grafton Master Plan Update

Price Proposal

And shall include the following:

- i. Lump sum and direct cost breakdown of payment schedule for completion of the project.
- ii. Schedule of professional fees on an hourly basis.
- iii. Completed/signed copies of the Statement of Tax Compliance/Non-Collusion and Certificate of Vote.

All proposals shall be delivered to:

**Grafton Planning Department
30 Providence Road
Grafton, MA 01519**

G. Review/Evaluation of Proposals

The ideal candidate is a firm or individual with thorough familiarity with Comprehensive Master Plan development and experience in preparing similar plans and documents. The Master Plan Consultant Selection Committee (the "Committee") will rate each proposal according to the criteria below and make a recommendation of the most advantageous proposal to the Grafton Board of Selectmen.

Ratings will comprise all or some of the following:

1. **HA** – Highly Advantageous
2. **A** – Advantageous
3. **NA** – Not Advantageous
4. **U** – Unacceptable

The composite rating of "Highly Advantageous" or "Not Advantageous" may be assigned only if a proposal has received at least one such rating among the criteria listed below. An automatic rating of "Unacceptable" is given to any proposal receiving any rating of this type to an item listed.

The ratings will be given to each proposal reviewed in the manner set forth below in detail.

Criteria

1. Extent of and quality of experience and past performance of the Consultant in the development of a Comprehensive Master Plan (Plan).

HA - There is evidence in the proposal that the Consultant has demonstrated an excellent level of past performance in providing services, similar to those being sought in this RFP, to more than one client with characteristics and requirements similar to or more extensive than those of the Town within the last 10 years.

A - There is evidence in the proposal that the Consultant has demonstrated a satisfactory level of past performance in providing services, similar to those being sought in this RFP, to at least one client with characteristics and requirement similar to or more extensive than those of Town within the last 10 years.

NA - There is evidence in the proposal that the Consultant has demonstrated a satisfactory level of past performance in providing services to other clients within the last 10 years, and has provided services to at least one other client with characteristics and requirements similar to those of the Municipality.

U - (1) There is evidence in the proposal that the Consultant has demonstrated an unsatisfactory level of past performance in providing one or more services to other clients; or (2) the Consultant has not provided services to a client with similar characteristics and requirements to those of Town within the last 10 years.

2. Demonstrated ability and experience working with municipal boards/committees and the public in preparation of a Plan.

HA - There is evidence that the Consultant has worked with two or more clients resulting in the municipal government preparing a Plan within the last 10 years.

A - There is evidence that the Consultant has worked with one client resulting in the municipal government preparing a Plan within the last 10 years.

NA - There is evidence that the Consultant worked with one or more clients, but has not resulted in a municipal government preparing a Plan within the last 10 years.

3. Qualifications, experience and involvement of the consultant team, including sub-consultants, in relation to successfully completed municipal projects.

HA - There is evidence in the proposal that key personnel are highly qualified and have successfully provided services, similar to those being sought in this RFP, to more than one client with characteristics and requirements similar to or more extensive than those of the Town within the last 10 years.

A - There is evidence in the proposal that key personnel are qualified and have successfully provided services, similar to those being sought in this RFP, to more than one client with characteristics and requirements similar to or more extensive than those of the Town within the last 10 years.

NA - There is evidence in the proposal that one or more of the Consultant's key personnel are minimally qualified or experienced, but others have more qualifications and experience and have provided services, similar to those being sought in this RFP, to more than one client with characteristics and requirements similar to those of the Town within the last 10 years.

U - The Consultant does not offer actual consulting services directly or through Contractors, or has not provided those services to client(s) with characteristics and requirements similar to those of the Town.

4. Demonstrated experience in public meeting facilitation with results of high level citizen participation, effective discussion, and non-partisan solutions.

HA – A project manager is proposed who has extensive experience in meeting facilitation to the extent that encourages a variety of meeting attendees to participate in the discussion and to contribute to identifying needs and setting goals for inclusion in a Plan.

A – A project manager is proposed with some meeting facilitation experience in developing citizen participation and generating usable solutions.

NA – A project manager is proposed that has no experience in meeting facilitation and in engaging a diverse population to participate in the discussions.

5. Overall project proposal, recommended timeline, and availability of resources, including support staff, to produce high quality, clear, and actionable Plan.

HA – The plan of services proposes a detailed, logical, and efficient scheme to produce a high quality Plan. All of the Contractor’s references indicate that the projects were completed on schedule, or with minimal, insignificant delays, and within budget

A – The plan of services proposes a credible scheme to produce a high-quality Plan. Only one of the Contractor’s references indicates that the project was completed with substantial delays attributable to the Contractor, and no current project or project completed within the last 10 years experienced substantial delays attributable to the Contractor.

NA – The plan of services is not sufficiently detailed to fully evaluate, or the plan does not contain all components necessary to produce a complete Plan. More than one of the Contractor’s references indicates that the project was completed with substantial delays attributable to the Contractor, and no current project or project completed in the last year experienced substantial delays attributable to the Contractor.

U – The proposed plan of services does not indicate adequate staff or resources to complete the Plan as needed. All of the Contractor’s references indicate that the project was completed with substantial delays attributable to the Contractor.

6. Evaluation of References

HA- References from one or more clients with characteristics and requirements similar to or more extensive than those of Town state that the Contractor demonstrated an excellent level of past performance in providing services similar to those being sought in this RFP and there are not references which are deemed unsatisfactory.

A- References from one or more clients with characteristics and requirements similar to or more extensive than those of Town state that the Consultant demonstrated a satisfactory level of past performance in providing services similar to those being sought in this RFP and any unsatisfactory references are not deemed indicative of the Consultant’s overall performance history.

NA- References from one or more clients state that the Consultant demonstrated a satisfactory level of past performance in providing services, but the services, in all cases, were not similar to or greater than those being sought in this RFP.

U- References from clients indicate that the Consultant demonstrated an unsatisfactory level of past performance in providing services or the references were not adequate.

H. QUESTIONS

Questions regarding this Request for Proposals shall be submitted in writing on or before February 7, 2022 to:

**Christopher McGoldrick, Town Planner
30 Providence Road
Grafton, MA 01519**

Or by email at: planningdept@graffton-ma.gov (Please include “Grafton Master Plan Update Questions” in the email subject line)

Responses to questions submitted will be forwarded to all firms receiving this Request for Proposals by February 11, 2022.

I. Preliminary Comprehensive Master Plan Outline Concept

The following list is an initial draft of sections and framework outline for the Comprehensive Master Plan Update. This list is a preliminary draft, subject to change during the development of the Comprehensive Master Plan Update and is provided for reference only to assist with formal scope development.

Adjustments to the Master Plan outline and framework shall remain consistent with the provisions of M.G.L. Chapter 41 Section 81D:

1. Introduction
 - a. Community Vision Statement
 - b. Guiding Principles
2. Executive Summary
 - a. Goals
 - b. Policies
 - c. Actions
3. History of Grafton
4. Cross Cutting Themes
5. Process/Methodology
 - a. Plan Development Phases
 - b. Data Collection
 - c. Public Outreach/Engagement
 - i. Public Workshops
 - ii. Community Survey
 - iii. Other Correspondence
 - d. Focus Groups & Interviews
6. Land Use
 - a. Goals, Policies & Actions
 - b. Purpose of Land Use Plan
 - c. Inventory and Build-out Analysis
 - d. Impacts of Growth
 - e. Land Use Options
 - f. Sub-Areas for Analyses
 - i. North Grafton Master Plan
 - ii. South Grafton Master Plan
 - iii. Neighborhoods
 - iv. Municipal Center
 - v. Business and Industrial Areas
 - g. Recommendations
 - i. Future Land Use
 - ii. General
 - iii. Zoning

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- iv. Subdivision Rules & Regulations
- 7. Housing
 - a. Goals, Policies & Actions
 - b. Housing Production Plan
 - i. Housing Needs Assessment
 - c. Housing and Population Trends
 - d. Market & Effect on Housing
 - e. Housing Types and Conditions
 - f. Alternative Styles of Housing (AirBnb, Over 55, Co-Housing, Assisted Living, etc.)
 - g. Housing Strategies
 - h. Recommendations
 - 8. Economics
 - a. Goals, Policies & Actions
 - b. Economic Trends & Conditions
 - i. Regional
 - 1. Access
 - 2. Roads
 - 3. Rail
 - 4. Air
 - ii. Local
 - 1. Economic Base
 - 2. Employment
 - 3. Businesses
 - 4. Change in Businesses
 - 5. Labor Force, Employment and Unemployment
 - 6. Tax Base
 - 7. Land Available for Development
 - c. Economic Development
 - i. Roles and Responsibilities in Economic Development
 - ii. Tools for Economic Development
 - d. Recommendations
 - 9. Traffic & Circulation
 - a. Goals, Policies & Actions
 - b. Existing Transportation Network
 - c. Recommendations
 - 10. Telecommunications, Internet Access & Digital Technology
 - a. Goals, Policies & Actions
 - b. Existing Resources and Assets
 - c. Technology Trends
 - d. Recommendations
 - 11. Resources & Public Facilities
 - a. Goals, Policies & Actions
 - b. Open Space & Recreation Plan
 - c. River Visioning and Canal Preservation Studies
 - d. Water Supply Protection Overlay District
 - e. Stormwater Management, Pollutants and Low Impact Design

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- f. Scenic Resources, Historic Resources and Unique Environments
 - i. MHC Historic Inventory
 - ii. Cultural Resources
 - iii. Scenic Roads
 - g. Farmland & Food Access
 - h. Recommendations
12. Health, Wellness & Quality of Life
- a. Goals, Policies & Actions
 - b. Regional Resources and Assets
 - c. Local Resources and Assets
 - d. Recommendations
13. Emergency Management
- a. Goals, Policies & Actions
 - b. Grafton Emergency Management Agency (GEMA)
 - c. Hazard Mitigation Plan
 - d. Recommendations
14. Implementation Plan